

# Document Management

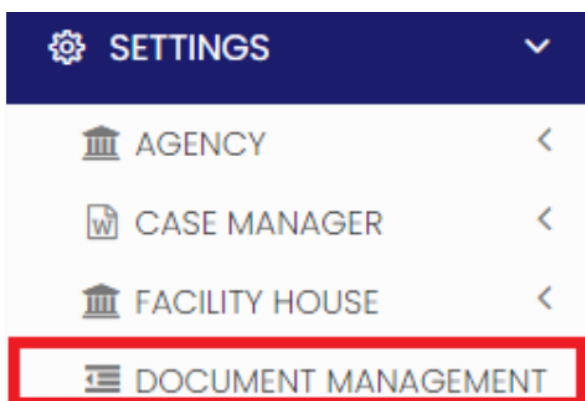
Document management in home health care involves efficiently organizing and storing patient records, treatment plans, and related documents to ensure high-quality care.

Note: All Fields marked with \* are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

## Adding New Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Folder, select the User type Referral/ Employee and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

DOCUMENT MANAGEMENT

Edit Document Management

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name \*

Care Plan

Role \*

Administrator, Clinical Team, ...

Color Scheme\*

#a81b1b

Is Time Based ?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	<div>Search</div> <div>Reset</div>
<input type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	<div></div> <div></div>
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	<div></div> <div></div>
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	<div></div> <div></div>

# Editing Folder

## Settings >> Document Management

Select the Folder from List and click Edit option on the right side of the screen.

Edit Document Management

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name \*

Care Plan

Role \*

Administrator, Clinical Team, ...

Color Scheme\*

#8c2b2b

Is Time Based ?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	<div>Search</div> <div>Reset</div>
<input checked="" type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	<div></div> <div></div>
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	<div></div> <div></div>
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	<div></div> <div></div>
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	<div></div> <div></div>
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	<div></div> <div></div>
<input type="checkbox"/>	Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	<div></div> <div></div>
<input type="checkbox"/>	Employee	Internal		Folder	reports	No	Yes	<div></div> <div></div>
<input type="checkbox"/>	Employee	Internal		Folder	auth	No	Yes	<div></div> <div></div>

Edit the required information and click Save option.

Edit Document Management

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name \*

Care Plan

Role \*

Administrator, Clinical Team, ...

Color Scheme\*

#8c2b2b

Is Time Based ?

No

Attached Template Form

Show To All

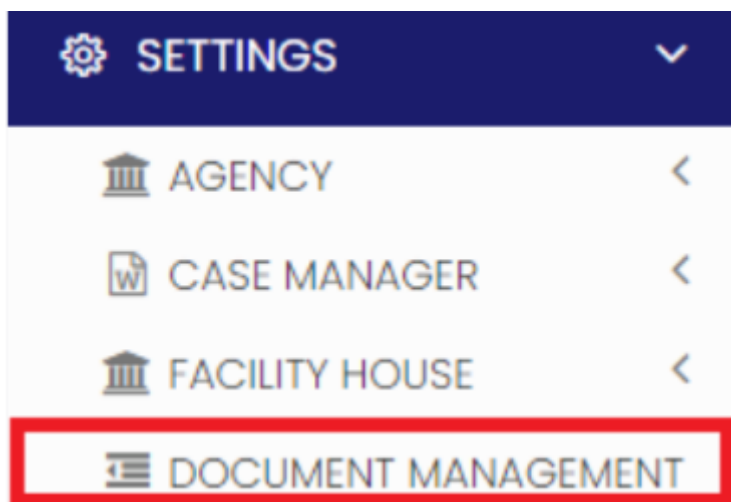
Yes

No

# Adding New Sub-Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Sub-Folder, select the user type Referral/ Employee, select the Folder name in which the sub folder has to be added and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

A screenshot of the 'Edit Document Management' form. The form has a title bar 'DOCUMENT MANAGEMENT' and a subtitle 'Edit Document Management'. It contains several fields: 'User Type\*' with a dropdown menu showing 'Referral'; 'Assignee\*' with a dropdown menu showing 'Clark, Samuel'; 'Documentation Type\*' with a dropdown menu showing 'Internal'; 'Folder / Subfolder\*' with a dropdown menu showing 'Subfolder'; and 'Folder\*' with a dropdown menu showing 'Care Plan'. There are also buttons for 'Save' (green) and 'Cancel' (red) at the top right. Below these fields are: 'Subsection Name\*' with a text input field containing '2023'; 'Role\*' with a dropdown menu showing 'Administrator, Clinical Team, ...'; 'Is Time Based?' with a dropdown menu showing 'No'; 'Attached Template Form' with a text input field; and 'Show To All' with two buttons, 'Yes' (grey) and 'No' (green). The 'Subsection Name\*' field and the 'Save' button are highlighted with red rectangular borders.

# Editing Sub-Folder

**Settings >> Document Management**

Select the Sub-Folder from List and click Edit option on the right side of the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ⓘ

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	Search Reset
<input type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	
<input checked="" type="checkbox"/>	Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	
<input type="checkbox"/>	Employee	Internal		Folder	reports	No	Yes	

Edit the required information and click Save option.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ⓘ

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	Search Reset
<input type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	
<input checked="" type="checkbox"/>	Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	
<input type="checkbox"/>	Employee	Internal		Folder	reports	No	Yes	

# Deleting Folder / Sub-Folder

## Settings >> Document Management

For deleting Folder / Sub-Folder in Document Management screen, select the Folder / Sub-folder from List by using the check box of the Folder / Sub-Folder and click Delete option or Disable Selected option on the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/> Select	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="checkbox"/> Select	<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/> Referral	Internal		Folder	Care Plan	No	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	Documents	No	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input checked="" type="checkbox"/> Employee	Internal		Folder	reports	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	auth	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

# Restore Deleted Folder / Sub-Folder

## Settings >> Document Management

The Deleted folder can be viewed by using the dropdown option Deleted after the Refresh option in the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Select

Documentation Type\*

Internal

Folder / Subfolder\*

Select

Name \*

Name

Role \*

Select

Is Time Based ?

No

Attached Template Form

Refresh

Active

All Records

Active

Deleted

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Action
<input type="checkbox"/> Select	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/> Employee	Internal	Professional Document	Subfolder	Certificate	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	Professional Document	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal		Folder	Plan of Care (485)	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	RE Plan of Care	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	PC Plan of Care	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Now the Deleted folder can also be restored by using the option Active on the right side of the screen.

Edit Document Management

Save Cancel

User Type\*

Select

Documentation Type\*

Internal

Folder / Subfolder\*

Select

Name \*

Name

Role \*

Select

Is Time Based ⓘ

No

Attached Template Form

Refresh Deleted

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Search Reset
<input type="checkbox"/>	Referral	External		Folder	Patient Test Report	No	<input checked="" type="checkbox"/> Active

Showing 1 to 1 of 1 records

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